Wealth Management

incorporate an evaluation of all suitable financial instruments to meet your unique needs. Beyond traditional wealth management, our planning includes an evaluation of tax-free or tax-deferred structured settlements, traditional annuities as an asset class, and both 529 plans and ABLE accounts. Advocacy Wealth works nationally with estate planning, elder law and trial attorneys, trustees, settlement planners, business owners, law firms, plaintiffs, and individuals who need more than just basic planning.

Advocacy Wealth has spent 15 years developing a team of well-equipped, empathetic, and thoughtful financial professionals who specialize in working with individuals and families who are trying to recover from a crisis and continue with their lives as close to normal as possible.

Advocacy Wealth does not set a minimum investment threshold and will work with clients on nearly any size of account to help build a plan of long-term security, investment management tailored to your needs, and liquidity on demand—all within a capital preservation ecosystem.

THE FORGE COMPANIES

protected debt securities can be unpredictable.

Interest Rate Risk: This risk refers to the risk that bond prices decline as interest rates rise. Interest rates and bond prices tend to move in opposite directions. Long-term bonds tend to be more sensitive to interest rate changes and therefore may be more volatile.